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MEMO

TO: EXECUTORS AND ADMINISTRATORS OF ESTATE

Appointment scheduled for: _____ **at** _____
(Date) (Time)

This Memo will summarize to you the information that I would suggest you bring to your appointment to discuss the administration of your loved one's estate. I have made this up as a form that can be copied by my secretaries and given to you when you inquire concerning the estate that you are involved with. I wish to express my condolences to you and look forward to assisting you.

You need to bring with you the following information to your appointment:

- 1) Will: Original Last Will and Testament. If you do not have this please bring a copy with information on where the original is.
- 2) List of Assets: Attached to this memo is a worksheet that you may utilize to assist you in making a list of the assets that were owned individually by the decedent. Please fill in as much information as you can concerning these assets.
- 3) Supporting Records: Please bring with you last year's income taxes (unless I did the income tax return or unless there was none filed last year) a copy of any bank statements, stock brokerage statements or other reports that relate to the assets you have described on the attached list, and any other supporting information that you may have such as legal descriptions, title insurance policies, deeds, abstracts, etc.
- 4) Relative Information: Please fill out the enclosed worksheet concerning names, addresses, telephone numbers and social security numbers of relatives that are involved in the estate. If you don't have social security numbers at least fill out as much as you can and bring it with you to the appointment.
- 5) Certified copy of Death Certificate: We may need more than one but this cannot be determined until your appointment.
- 6) Motor Vehicle Titles: Please bring the original vehicle titles and registrations. Also, please make sure you know the license plate number for each vehicle.
- 7) Bills: In the event that there are any debts or bills that are owed by the Decedent please fill out the enclosed worksheet. For instance, there may be a funeral bill that is owed or last illness expenses. I have attached a worksheet to help you with this.

I hope this is helpful to you in organizing your information before you come in for your appointment. I look forward to seeing you.

